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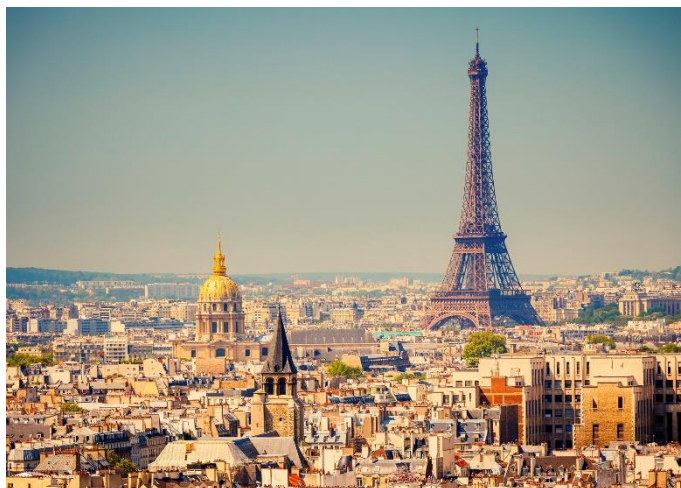
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International wine markets and wine quality

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International wine markets and wine quality

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The French wine production forms an integral part of the international economy ; wine exports have always played a major role in enhancing the value of French wine, particularly those from the Bordeaux region which were much appreciated by the English Court and aristocracy. In recent years, however, France's position in the world market has changed, until 1960, competition from other countries only really affected table wines. The French stood alone as suppliers of high-quality products, and classifications were based on French geographical categories.

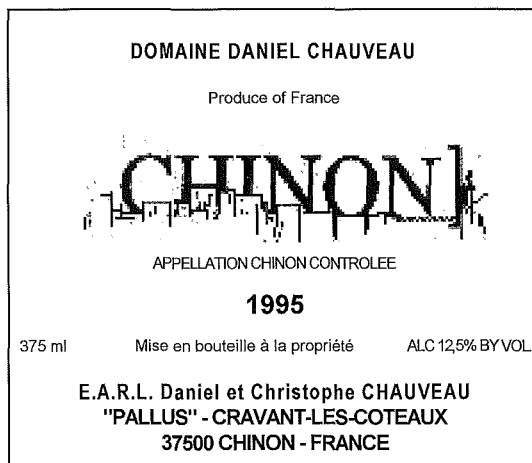
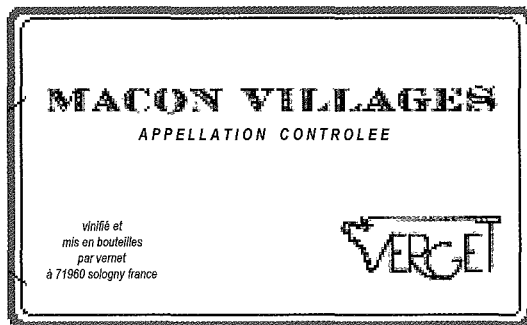
Today, the finest wines are still produced in France, but the supply and demand structure has changed considerably. Wineries in California, Chile, South Africa and Australia also produce fine wines, many with the help of qualified labour from France. In parallel, major French companies have invested in other countries, thus finding a way to avoid legal and geographical constraints and protectionist policies ; examples include *Moët et Chandon* in the U.S.A. and Brazil, or *Laurent Perrier* which has entered into partnership with *Almaden Vineyards*, one of the largest wine growers in the U.S.A.

This recent globalisation of wine markets constitutes a threat to the French wine classification system and all the professional organisations linked to it.

FRENCH WINE PRODUCTION : A REGIONAL TRADITION

The name of a wine producer tends to be less important than that of the region, but the two are intimately linked. Perceptions of the objective properties of wine go hand in hand with interiorisation of an established social hierarchy. In France, the geographical origin of a wine

gives it its place in the hierarchy. The name of an appellation, a State-regulated invention aimed at valorising the product, is marked clearly on the label, while the grape varieties (*cépages*) used are not shown. And the different appellations are classified in regions, which are in turn subject to a hierarchical order.



Producers of appellation wines must work to establish their individuality so as to achieve financial and symbolic profits.

most prestigious awards), and many of the French consumer guides, only compare wines from the same appellation.

The official classifications imposed by the *Institut National de l'Appellation d'Origine* are based on the principle that each wine has its specificity, and can only be appreciated by comparing it with other wines within the same AOC (*Appellation d'Origine Contrôlée*). The competitive system which has been developed (the *Salon de l'Agriculture* prize and the *Mâcon* prize being the

A LUXURY PRODUCT (LIKE ART OR JEWELRY) OR A FOOD ?

(Documents and posters exhibited at the Paris National Agriculture Fair in 1999)

The AOC classification is assimilated with the Red Label or Organic qualifications.

<p>A la Découverte du Pays de la Qualité</p> <p><i>Quatre signes officiels de qualité guident les consommateurs dans leurs choix de produits agricoles et agro-alimentaires de qualité. Tous sont garantis par les pouvoirs publics en application de cahiers des charges stricts, dont le contrôle est assuré par des organismes indépendants. Chacun traduit une spécificité, souvent mal connue par les consommateurs.</i></p> <p>Les pays de la Loire vous invitent à les découvrir au travers d'une gamme de produits de qualité très diversifiés (viande, volailles, charcuterie, produits laitiers...) comme nulle part ailleurs :</p> <ul style="list-style-type: none"> - 76 produits identifiés par le Label rouge - 29 bénéficiant de l'Appellation d'Origine Contrôlée - 4 produits certifiés - 1ère région française de produits issus de l'agriculture biologique 	 <p>Label Rouge</p> <p>Il garantit la qualité supérieure d'un produit.</p> <p>En région des Pays de la Loire :</p> <ul style="list-style-type: none"> - les volailles : volailles fermières de Loué, de Challans, d'Ançenis, de la Région de Cholet, de Mayenne et de celle du Bocage Vendéen, volailles "Favori", - les viandes bovines : bœuf fermier du Maine, bœuf blond d'Aquitaine, tendre Charolais, bœuf fermier de Vendée, veau de boucherie nourri au lait entier, - les viandes porcines : porc Cénomans, porc fermier de Vendée, - les viandes ovines : agneau fermier des 4 saisons, Agnocéan, - les charcuteries : véritable jambon de Vendée, jambon cuit supérieur, saucisses de Strasbourg, saucisses cocktail, saucisses fraîches crues, rillettes de la Sarthe, rillons et rillauds, pâté de campagne supérieur, - le sel de Guérande. 	<p>AOC APPELLATION D'ORIGINE CONTRÔLÉE INAO</p> <p>Elle identifie les produits liés au terroir et à un savoir-faire traditionnel.</p> <p>En région Pays de la Loire :</p> <ul style="list-style-type: none"> - les vins : vins d'Anjou, de Saumur, de Nantes, des Fiefs Vendéens, de la vallée du Loir, - le beurre Charente-Poitou.  <p>L'Agriculture Biologique</p> <p><i>L'agriculture biologique est un mode de production agricole reposant sur :</i></p> <ul style="list-style-type: none"> - l'interdiction d'utiliser des produits chimiques de synthèse, - des méthodes de production respectueuses de l'environnement et du bien-être des animaux.
<p>Signature Régionale des Pays de la Loire</p> <p>La signature régionale Pays de la Loire est une marque commune pour les produits agricoles et agro-alimentaires bénéficiant d'une procédure de certification reconnue (Appellation d'Origine Contrôlée, Label rouge, Certification de Conformité, Agriculture Biologique), afin d'identifier l'origine et de défendre le patrimoine régional.</p>	 <p>Certification de Conformité</p> <p><i>Elle assure la qualité constante d'un produit à partir de ses caractéristiques spécifiques (production, transformation et/ou conditionnement).</i></p> <p>En région des Pays de la Loire :</p> <ul style="list-style-type: none"> - les volailles "Pleine Saveur", - la viande bovine : jeune bovin Charolais, veau Les Vitelliers, veau ourmand "BIF ARMOR" 	<p>En région des Pays de la Loire :</p> <ul style="list-style-type: none"> - les vins d'Anjou, de Saumur et de Nantes, - les volailles, les viandes bovines et porcines, les charcuteries, les produits laitiers (beurre, lait, fromage de chèvre et camembert), - les fruits et légumes, céréales, biscuits, biscottes, pain et sel de mer.

Historically, the AOC system has been extremely successful, and has been extended to cover other specific products such as potatoes, poultry, beans, etc. In addition, the AOC qualification system has inspired standards such as Red Label or Organic, etc. However, the characteristics of rarity and distinction conferred by

the AOC qualification will disappear when certified production systems are standardised. Furthermore, French wine consumption patterns have changed in recent years (in terms, of quality, quantity and purchasing habits). The consumption of wine has become an occasional social habit, in the company of

friends and family. Much more attention is paid to the specialised literature (consumer guides and magazine articles). These publications encourage and sustain a more cosmopolitan lifestyle : trips abroad for business or pleasure, city dwelling which makes it more difficult to build up a cellar. Foreign products are mentioned increasingly and everywhere.

SOUTH AFRICA : NEW COMPETITORS IN THE INTERNATIONAL MARKET : VALORISATION OF GRAPE VARIETIES

Regional references are disappearing, to be replaced by producer's name. Social behaviour with regards wine differs in California, South Africa, Australia and Japan ; previously, most wine lovers came from a cosmopolitan élite group, familiar with French culture and its geographical and gastronomic specificities. In recent years, wine has come to be enjoyed by the middle classes, recently won over by Western customs ; wine is a social drink replacing tea, beer or spirits. International competitions such as the "International Wine Challenge" or "Veritas", classify wines by their grape varieties. These foreign references have to some extent been legitimised by the founding of the international wine fair in Bordeaux, *Vinexpo*. Furthermore, wine tasting tends to be associated with a particular type of tourism, as has become clear during several wine fairs, where exhibitors offer wine-based holidays to destinations throughout the world.

region : *Pays d'oc, Châteauneuf du Pape, Rhône wines, grenache, syrah, viognier, etc.*

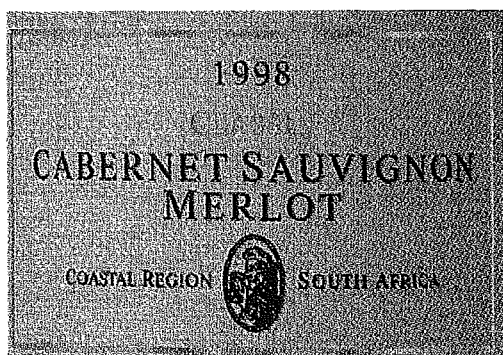
If a claim is to be made to universal recognition, then producers must comply with the idea of regional identity, either that of the appellation, or of the growers' cooperative attached to that appellation, while at the same time working to promote their product on the basis of other criteria, such as the grape variety. This ambiguity is more pronounced when appellations are situated towards the bottom of the wine classification system. In many cases, it is unknown producers who adopt this strategy.

Producers in an appellation which has a particular reputation, because of their own products, because of the institutions responsible for the appellation (growers' association or *Confrérie*, etc.),-...or through the judgement of juries or consumers, are thus open to a wide range of social markets. They must take account of this social behaviour when devising their market strategy, which often requires extra effort and a dual approach.

AN INTERNATIONAL INDUSTRY : GRAPE VARIETIES AS A CRITERION FOR EXCELLENCE

A major American wine company (*Robert Mondavi*) now offers both Californian and French wines, produced using Cabernet, Cabernet-Sauvignon or Chardonnay grapes.

At the *Vinexpo* wine fair, Robert Mondavi now ranks alongside some of the most prestigious French wine producers.



ASSOCIATIONS BETWEEN GRAPE VARIETY AND LOCAL IDENTITY

Some French growers classify their production by grape variety. The graphic conception of the poster gives rise to confusion in terms of grape variety, appellation and

SOYEZ LE BIENVENU ! WELCOME TO THE ROBERT MONDAVI PAVILION AT VINEXPO 1999.

The Robert Mondavi commitment to excellence extends from the vine-yards to the bottle to how we reach our customers. Millions of people in more than ninety countries around the world enjoy wines from the Robert Mondavi Family of Wines.

Today, we are pleased to offer the following California and French wines for your tasting pleasure.

1995 Cabernet Sauvignon
1996 Chardonnay
1996 Pinot Noir
1997 Fumé Blanc
1996 Merlot
1997 Zinfandel